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# Gateway User Guide

## Submitting Completed Budget Forms

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## Introduction

This user guide will assist with submitting forms after they have been completed. Once a form has been submitted, it can no longer be edited. This is the final step for most units in the Gateway Budget application. Submitting the forms is an essential step as it allows the Department to review and potentially certify a unit's budget.

## Deadlines

Not all forms are due on the same date. The Form 3: Notice to Taxpayers should be submitted once it has been sent to be published. This allows the Department to post units' Notice to Taxpayers online at [www.budgetnotices.in.gov](http://www.budgetnotices.in.gov). The County Council Review Worksheet must be submitted by **September 2, 2014**. The Debt Worksheet only needs to be submitted if the unit is repaying a debt through a debt service fund. With the exception of the Form 3 and County Council Review Worksheet, all other forms are to be submitted within 48 hours of adopting the budget.

Outside of Gateway, Indiana Code 6-1.1-17-3 requires that the first publication of the Notice to Taxpayers must be **no later than September 13**, and the second publication must be **before September 21**. Please contact your Field Representative regarding additional advertising and other deadlines.

## Signing the Form Electronically

At the bottom of all the forms except Form 3 and Form 4, there is a box for placing an electronic signature on the form. Only the user with submission rights will see the signature box.

To sign the form, first type your name and title into the signature box. After that, you will need to enter a four-digit PIN. This PIN has been sent to the person with submission rights via email. You may contact the Department at [gateway@dlgf.in.gov](mailto:gateway@dlgf.in.gov) or at (317) 232-3777 in the event that you have lost or not received a PIN code. Once you select "Sign and Date Form," today's date will automatically populate the date field.

**Form Signature**

NAME  
John Smith

TITLE  
Auditor

SIGNATURE/PIN  
••••

DATE  
06/12/2012

Form signature values saved at 02:54 PM and 58 seconds.

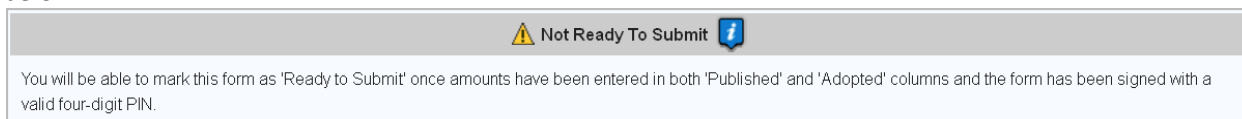
✓ SIGN AND DATE FORM

Once the red text appears stating "Form signature values saved," the form is successfully signed. Each form will need to be signed individually prior to submitting.

## Validation/Required Fields

Most forms in Gateway have some type of validation that must be satisfied before the form can be marked as “Ready to Submit” and then be submitted. Due to the variety of units that submit budgets, validation can only check for very basic criteria. As a result, although the “Ready to Submit” option appears, it does not mean that the form is necessarily complete.

At the bottom of each form is the “Ready to Submit” status box. An example from Form 1 is shown below.



The screenshot shows a grey status box at the bottom of a form. At the top, it says "Not Ready To Submit" with a yellow warning triangle icon and a blue information icon. Below this, in smaller text, it reads: "You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN."

Each form’s Ready to Submit status box contains a list of all the validation that must be met in order to be able to submit the form. The Form 1 example above reads,

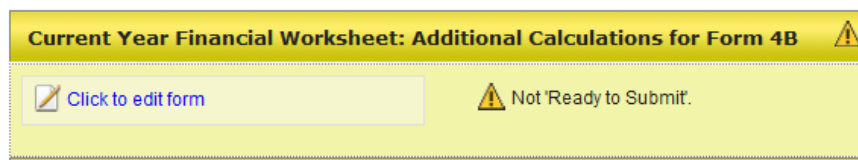
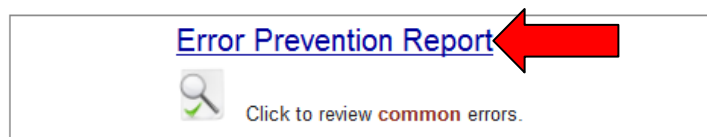
*“You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN.”*

In Form 1, Gateway will check to make sure that the form has been signed and at least one amount has been entered in both the published and adopted columns. It is possible to submit Form 1 with only a single line item as long as both amounts are entered. This is why is very important to review the forms individually for accuracy and completeness prior to submitting them.

Each form has its own validation which can be reviewed by reading the “Not Ready to Submit” box at the bottom of the form. As long as the forms are complete, no issues should be encountered marking the form as “Ready to Submit.”

## Error Prevention Report


The Error Prevention Report is designed to help users prevent basic commonly made mistakes. It is *highly recommended* that this report be run before publishing, adopting, and submitting budget forms. Any error that appears should be reviewed to better ensure accuracy. The link to this report can be found on top of the Budget Form Menu.



The screenshot shows a yellow status bar at the bottom of a form. On the left, there is a button with a pencil icon and the text "Click to edit form". On the right, there is a yellow warning triangle icon and the text "Not 'Ready to Submit'". Above the status bar, the title "Current Year Financial Worksheet: Additional Calculations for Form 4B" is visible.

The potential errors in this report are divided into two categories: errors to review prior to publishing and errors to review after submitting Form 3. The determining factor on which errors appear is the submission status of Form 3. The Error Prevention Report will automatically generate upon opening the report. Please be sure to review these errors before publishing Form 3: Notice to Taxpayers and later review the new list of errors after publishing.

Upon opening the report, a list of potential errors will populate the page below. It is very important to note that **this report will not find all possible mistakes, but is designed to catch the most common ones.**



## Error Prevention Report

Please take the time to address the following issues as they frequently indicate errors. Once an issue is corrected, it will be removed from the list. **This tool will not find all possible mistakes, but is designed to catch the most common ones.** For assistance resolving these issues, please contact the DLGF at [gateway@dlgf.in.gov](mailto:gateway@dlgf.in.gov) or 317-232-3777.

Some errors will appear if the forms are not yet complete.

[Run Error Audit](#)

Form / Error #	Error	Details	Funds Affected
CCRW / 23	County Council Review Worksheet is not submitted.	The County Council Review Worksheet is not submitted. This form must be submitted through Gateway for non-binding review by September 1.	No Fund Detail
CYFW / 24	Line 9 does not equal Line 2, published column, Form 4B.	Line 9 "Estimated Current Year Expenditures July through December" on the Current Year Financial Worksheet does not equal Line 2 "Necessary expenditures, July 1 to December 31 of present year, to be made from appropriation unexpended" on the published column of the Form 4B. Please check the following funds.	<a href="#">8 fund(s) affected</a>

This will list the errors as categorized by the form and number of errors, the error, a description of the error, and a link to display the funds that are affected by this error.

To view the list of affected funds, click the blue "# fund(s) affected" button.

	column, Form 4B.	column of the Form 4B. Please check the following funds.	
F4B / 18	Line 1 in published column does not equal fund total in published column, Form 4A.	Line 1 in the published column of the Form 4B does not equal the fund total in the published column of the Form 4A. Please check the following funds.	<a href="#">3 fund(s) affected</a>
F4B / 18	Line 1 in adopted column does not equal fund total in adopted column, Form 4A.	Line 1 in the adopted column of the Form 4B does not equal the fund total in the adopted column of the Form 4A. Please check the following funds.	<a href="#">3 fund(s) affected</a>

Once the funds affected button has been selected, a list of the funds containing the error will appear.

**Funds with Errors:**

0061: RAINY DAY | Form4A Published: 0.00 | Form4B Published: 4100.0000

0101: GENERAL | Form4A Published: 0.00 | Form4B Published: 23165.0000

0840: TOWNSHIP ASSISTANCE | Form4A Published: 0.00 | Form4B Published: 9135.0000

[Done](#)


Please submit form as soon as possible.

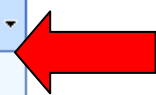
Some officials may find it useful to print out the errors. This page can be printed through the print option on the top, left-hand side of the page.

Selected Year: 2015

Selected County: 26 - Gibson County

Selected Unit: Gibson County

 Click Here for Print/View Options for entire unit  
[Print/View Error Report for All Funds for Selected Unit in All Formats](#)




## Error Prevention

Once the page appears in a new window, click on the icon that resembles a save icon in the middle at the top of the page to view the export options.

1 of 2  
 Selected Unit: 26 0000 GIBSON COUNTY  
**Error Prevention Report**

Form / Error #	Error	Details	Num
CCRW / 23	County Council Review Worksheet is not submitted.	The County Council Review Worksheet is not submitted. This form must	



- XML file with report data
- CSV (comma delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word





From the list of export options, the Error Prevention Report may be exported into a PDF, Word, Excel, or many other different file types. This allows users to personalize how they wish to have data displayed.

As errors are corrected they will be removed from the list the next time the report is accessed. Please remember that once Form 3 is submitted, Gateway will begin checking for additional errors once the report is accessed again.

## Marking the Form “Ready to Submit”

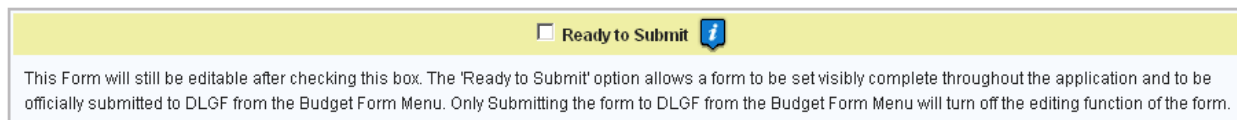
As previously mentioned, at the bottom of each form are the “Ready to Submit” status boxes. Before completing the form a grey box will display that is titled “Not Ready to Submit.”

As in the past, the 2015 budget forms have a feature built in called validation. This does not allow the form to be marked as “Ready to Submit” or be submitted until the required fields are complete. Validation will help prevent some commonly found errors. Upon closer review, you will notice that each grey “Not Ready to Submit” box states the validation for each form.

 Not Ready To Submit 

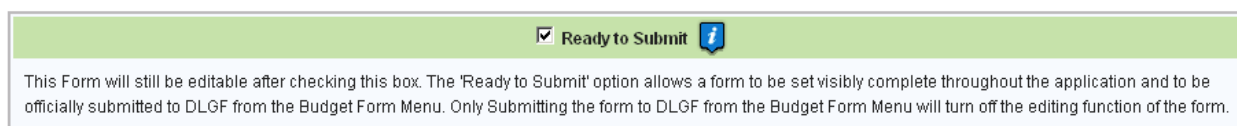
You will be able to mark this form as 'Ready to Submit' once amounts have been entered in both 'Published' and 'Adopted' columns and the form has been signed with a valid four-digit PIN.

Once all the listed validation has been completed, users will then have the ability to mark the form as ready to submit by clicking on the check box. Users with either submission or editing rights will be able to mark the form as “Ready to Submit.” Do not check this box until it is confirmed that the form is complete and correct. Validation can only check for certain basic things, only you can confirm that the form truly is ready to submit.



This screenshot shows a yellow header bar with the text "Ready to Submit" and an information icon. Below the header, a text box explains that the form remains editable after checking the box and that submitting to DLGF from the Budget Form Menu will turn off the editing function.

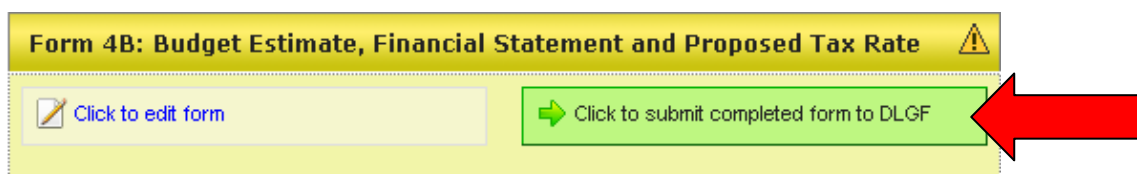
Once this box is checked, the box will turn green and the form will now be marked as Ready to Submit. The form can still be edited until it is submitted.



This screenshot shows the same interface as the previous one, but the "Ready to Submit" checkbox is now checked, and the header bar has turned green.

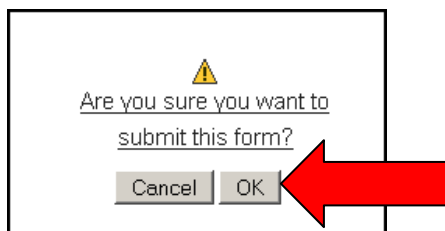
## Submitting a Form

Note that after a form has been marked as “Ready to Submit”, the form under the Budget Form Menu now shows a green submit option.



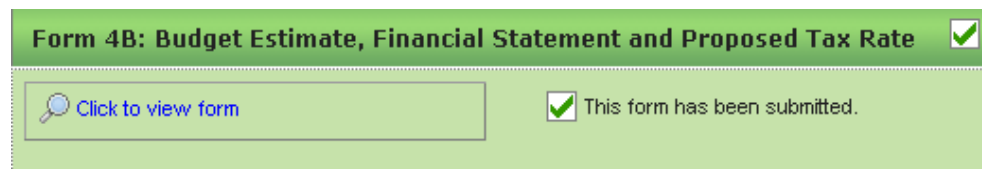
This screenshot shows the form title "Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate" with a warning icon. Below the title, there are two buttons: "Click to edit form" and "Click to submit completed form to DLGF". A red arrow points to the green submit button.

If the form is complete and no further changes will be needed, click on the green “Submit” button. A pop-up box will appear asking if you are sure you want to submit this form. If you are sure simply press “OK”.



This screenshot shows a confirmation dialog box with a warning icon and the text "Are you sure you want to submit this form?". There are two buttons: "Cancel" and "OK". A red arrow points to the "OK" button.


As depicted below, the form on the Budget Form Menu will now appear green and the only option available is to view the form.



This screenshot shows the form title "Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate" with a checkmark icon. Below the title, there are two buttons: "Click to view form" and "This form has been submitted.".

You will continue submitting your remaining forms, with the exception of Debt Worksheet if it is not applicable.

Current Year Financial Worksheet: Additional Calculations for Form 4B	<input checked="" type="checkbox"/>
Debt Worksheet	<input checked="" type="checkbox"/>
Form 1: Budget Estimate	<input checked="" type="checkbox"/>
Form 2: Estimate of Miscellaneous Revenues	<input checked="" type="checkbox"/>
Form 3: Notice to Taxpayers	<input checked="" type="checkbox"/>
Form 4: Ordinance / Resolution of Appropriations and Tax Rates	<input checked="" type="checkbox"/>
Form 4A: Budget Report	<input checked="" type="checkbox"/>
Form 4B: Budget Estimate, Financial Statement and Proposed Tax Rate	<input checked="" type="checkbox"/>

 [Click to view form](#)

☒ This form has been submitted.

Please also ensure the County Council Review Worksheet is submitted from the Unit Main Menu by **September 2, 2014**. The Sign and Submit button will save the signature and submit the worksheet in a single click.

You may no longer edit a form once it is submitted. If you have submitted a form by mistake please contact the Department at [gateway@dlgf.in.gov](mailto:gateway@dlgf.in.gov) or at (317) 232-3777.

Congratulations! You have successfully submitted your budget forms. You will also need to scan and upload certain documents such as your Proof of Publication and your Signed Form 4. Please see our other user guides for assistance with other portions of the budget. If you have any questions, please contact the Department at [gateway@dlgf.in.gov](mailto:gateway@dlgf.in.gov) or at (317) 232-3777.